

## **Long-Term Care Planning Grant for Community Care of Central Wisconsin**

**APPLICANT ORGANIZATION/CONTACT:** Partners in developing this proposal to create a multi-county consortium in central Wisconsin, **Community Care of Central Wisconsin**, include the following organizations in Portage, Marathon, and Wood Counties: North Central Health Care (Marathon County), Marathon County Department of Social Services (DSS), Wood County Unified Services, Wood County DSS, and Community Care of Portage County *in cooperation with* the Aging and Disability Resource Center (ADRC) of Portage County and the newly formed ADRC of Central Wisconsin (covering Marathon and Wood Counties). The consortium is represented by Jim Canales, Director, Community Care of Portage County, 817 Whiting Avenue, Stevens Point, WI 54481. Telephone: (715) 345-5800. Email: [canalesj@co.portage.wi.us](mailto:canalesj@co.portage.wi.us). Fax: (715) 345-5725. **GRANT REQUEST:** \$250,000. Our intention is to capitalize on the existing partnerships, strengths and capacities in Portage, Wood, and Marathon Counties to create a regional Care Management Organization (CMO), Community Care of Central Wisconsin (CCCW), to operate within the Family Care model by December 2007. CCCW will build on Portage County's experience as one of five pilot sites for Family Care in Wisconsin and will expand Portage County's infrastructure to serve the tri-county region. Currently, Portage County successfully operates a state-certified CMO, Community Care of Portage County (CCPC), which has been in business since April 1, 2000. Planning outcomes will include the development of strategic transition plans to guide the governance, administration, and operation of the proposed new organization along with development of a sound business plan and infrastructure to be shared across the three counties. A *Transition Team* from each of the three counties will be appointed by each County Board to participate in the strategic transition planning process including appropriate county health care, fiscal, data processing, and economic support staff. We anticipate "rolling out" Marathon County's Family Care program by January 2007 and Wood County's start-up by October 2007.

**AREA:** The geographic area served will include Portage, Marathon and Wood Counties, three contiguous counties located in central Wisconsin. The populations of the three counties are 68,935, 127,773, and 75,990 respectively for a total population of 272,698. Based on Portage County's experience (steadily serving about 1.2% of the county population), we estimate that there may be more than 3200 individuals to be served through Family Care in this tri-county area. According to recent actuarial figures verbally stated by the Wisconsin

Department of Health and Family Services (DHFS), 600 consumers is the minimum number to ensure financial viability for the Family Care model. We are confident that the potential for serving more than 3200 through CCCW will provide us with solid financial footing to support this CMO. During the two-year planning grant period and when services have been established for Marathon and Wood Counties, other county partners may be invited to join the consortium to expand the service area. **BACKGROUND:** Portage County operates a certified CMO and ADRC offering the complete Family Care benefit to 850 residents (frail elders, physically and/or developmentally disabled adults including those with co-occurring mental disorders and substance abuse service needs) as its current long-term care system. The long-term care system serving the same population in Wood and Marathon Counties incorporates the Community Options, Home and Community-Based Waiver Programs and county tax levy serving 813 and 706 individuals respectively. Another 243 individuals in Marathon County and over 200 in Wood County are on waiting lists for these programs. Acute and primary health care is coordinated through Interdisciplinary Service Teams (IDTs) in Portage County's CCPC. Health care services in Wood and Marathon Counties are coordinated through long-term support care managers. Positive opportunities for long-term care reform in this tri-county region include the fact that all eligible residents would have the chance to be served in the residence of their choice. It would eliminate current waiting lists allowing all residents to benefit from the high quality Family Care model developed in Portage County. By building upon the successes of Portage County's model and increasing the service area and scale, we will have the opportunity to become more cost-effective while enhancing quality of service. Risk will be spread across a larger population of members to improve long-term viability. The most challenging barriers will be political as the three counties will have to decide on shared governance, design common infrastructure, and address contract issues. The generally slower pace of government will also present challenges. Because Family Care requires a swift response as an entitlement, the regional organization will need to be able to act quickly and effectively. Another challenge will be the need for the three counties to continue providing services and "business as usual" while designing a new system. There is promise of overcoming these barriers when considering past successful tri-county collaborative endeavors. **PARTNERS/RESOURCES:** A *Transition Team* from each of the three counties will include consumers, appropriate agency representatives, government officials, and other stakeholders to provide multi-

disciplinary and cross-sector perspectives and expertise. By having consumers engaged on the *Transition Teams*, there will be a strong voice to prepare the foundation for this new regional initiative ensuring that consumer concerns/suggestions are considered from the start and integrated into the core design of CCCW. The three teams will collaborate to decide on governance, determine how shared infrastructure will work, develop a solid business plan, and create detailed operational plans to guide the maintenance of Portage County's strong Family Care program while phasing in Family Care—first in Marathon and then in Wood County. Portage County's existing working committees of consumers/consumer representatives who understand the Family Care model will be involved on *Consumer Teams* to work with consumers in Wood and Marathon Counties to address concerns, develop tri-county quality assurance and self-directed support mechanisms, and participate in planning the overall design of the regional CMO. As Mrs. Janis Ribbens, CCPC Board Member and participant in Portage County puts it: *"Since 2000 when it began, CCPC has provided my husband and I with the services, support, and opportunity to direct our own cares needed to live in our own home. I am looking forward to sharing my experiences with residents of the other central Wisconsin counties being proposed in this RFI/RFP."* Each county has well-developed institutional/community resources and unique expertise which will be leveraged to benefit CCCW. Each county has committed in-kind matching resources toward this cooperative planning effort.

**COORDINATION/ INTEGRATION:** By the time of grant notification, an ADRC will exist in each of the three counties proposed to partner in CCCW. ADRCs in Portage and Marathon Counties were created in 1999 as two of the first nine pilot counties in the State. A joint agreement by Marathon and Wood Counties has established a consolidated ADRC which will launch in January 2006. The ADRCs in each county will provide Family Care-related eligibility, enrollment, and coordination of economic support services. CCCW will expand on Portage County's existing infrastructure for Family Care to serve the tri-county region. It will be much more efficient for Wood and Marathon Counties to coordinate with a county (Portage) that is experienced in launching and operating a successful Family Care model. They can take advantage of the dedicated data processing/information systems and business/administrative staff in Portage County that are also experienced in developing and implementing this program. By expanding on Portage County's business infrastructure, Marathon and Wood Counties can "hit the ground running" and reduce start-up time for Family Care to begin serving their own

residents. Also, Portage and Wood Counties are two of the four counties currently participating in the Medicaid Management Information Systems (MMIS) pilot being conducted by the State to redesign current information systems. Lessons learned through the development of MMIS (to be completed in 2007) will lend themselves to advancements for the proposed development of CCCW. These planning grant efforts also integrate with a recently awarded *Community Links* grant to the Wood County DSS which is beginning to develop an IDT model of service in preparation for a managed care program. **READINESS:** Portage, Wood, and Marathon Counties have been collaborating on the proposed regional CMO for approximately one year. Discussion has centered on implementation of a tri-county Family Care program for frail elders and physically and/or developmentally disabled adults (including those with co-occurring mental health disorders and substance abuse service needs). The consortium will build on best practices, established infrastructure (data processing/information systems and business/administrative systems), and consumer and staff experiences in Portage County. By expanding on Portage County's existing infrastructure and lessons learned, it will improve readiness and decrease start-up time for Marathon and Wood Counties. In December, 2005, resolutions were passed in both Marathon and Wood Counties by their respective County Boards to declare support for participation in this planning grant, clear evidence that they are ready to plan for managed care. Marathon County has demonstrated a commitment to long-term care redesign for the past eight years by being an active Alternative CMO Site selected by DHFS and shadowing the Portage County CMO as first steps in preparing to replicate the program. Wood County is also committed to long-term care reform and has started to develop the program infrastructure to support a Family Care model. Each of the three counties has a strong history of collaborative, multi-county experience in social and health services including: Portage, Wood, and Adams Counties have worked together on a W-2 consortium; Marathon County's North Central Health Care (NCHC) has a long history with multi-county systems since the 1970's; Marathon and Wood Counties have recently developed a joint ADRC. In addition, many of central Wisconsin's long-term care providers offer services/goods on a regional basis further supporting readiness for change. Results from the MMIS pilot in Portage and Wood Counties will increase readiness by preparing for future technology development. There are over 250 years of managed care, business, and social service experience among the core tri-county planning team contributing to overall readiness. According to Mr. O. Philip

Idsvoog, Chair, Portage County Board of Supervisors, “CCPC has provided a great service for Portage County residents over the last five years....We should pursue this option (RFI/RFP) for the opportunity to provide this program to our surrounding counties.” **BUDGET (Feb 2006 – Dec 2007):** *Personnel (including fringes):* 1 FTE Project Manager, \$160,000 (to implement transition plans) + .30 FTE General Support Staff, \$25,000 (clerical); *Equipment/Supplies:* Technology Start-Up, \$8,000; *Travel:* Tri-County Travel for Project Manager, \$7,000; *Contract Staff:* Managed Acute/Primary Health Care Consultant, \$50,000. **Total Request, \$250,000.**

**Matching (including staff time, local travel, overhead), \$220,953 (88%)** = (Portage County, \$91,840 + \$1,200 from UW-Extension Consultant) + Wood County, \$65,089 + Marathon County, \$62,824. **GRANT TIME-TABLE WITH (\*DELIVERABLES):** **2006:** February, *Transition Team* appointments in each county (\*Resolutions); February – June, Strategic transition planning with UW-Extension Consultant and *Consumer Teams* (\*Regional CMO strategic framework, tri-county business plan and transition plans approved); March, Hire Project Manager, Support Staff and set up office (\*Staff hired, offices equipped); September, Hire Managed Acute/Primary Health Care Consultant (\*Contract created and signed); October, Formation of IDTs with staff training (\*Staff transition plan); **2007:** January, Roll-out Marathon County’s Family Care program—*other grants may be sought* (\*Begin phasing COP, CIP and other waiver enrollees into Family Care); October, Roll-out Wood County’s Family Care program—*other grants may be sought* (\*Begin phasing COP, CIP and other waiver enrollees.); December, Wrap-up and discuss recommendations of Managed Acute/Primary Health Care Consultant (\*Final grant reports, meeting minutes, acute/primary health care report). **CLOSING:** We believe that the approach detailed herein represents the most desirable option for maintaining and extending a managed long-term care system to frail elders and adults with physical and/or developmental disabilities living in central Wisconsin because: 1) We have the capacity, confidence, and commitment needed to achieve this goal as a consortium. 2) Our political leaders have demonstrated commitment and readiness for change. 3) We will have the scale (potential 3200+ consumers) to create a sustainable, financially viable regional organization. 4) Portage County’s model is a high quality, successful one—worth building on for faster, stronger start-ups in neighboring counties. 5) We will begin to examine the feasibility of integrating acute/primary care within the Family Care model. 6) Our approach is *doable* and paves the way for possible future expansion to other counties.